File #: 2019-0618, **File Type:** Contract **Agenda Number:** 10.

PLANNING AND PROGRAMMING COMMITTEE
NOVEMBER 20, 2019

SUBJECT: THIRD PARTY REQUEST FOR DEVIATIONS FROM SYSTEMWIDE STATION DESIGN STANDARDS POLICY

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

APPROVE Third Party Request for Design Deviation from Systemwide Station Design Standards.

ISSUE

The Board-adopted Systemwide Station Design Standards (SWSD) Policy (Attachment A) requires all new Metro rail and BRT stations be in compliance with Metro's SWSD Standards, unless otherwise approved by the Board. The University of California, Los Angeles (UCLA) has requested deviations from the SWSD Standards for the northwest entrance structure and plaza finishes at the future Westwood/UCLA Purple Line Station.

BACKGROUND

In January 2018, the Board adopted the SWSD Policy, which requires all new Metro station designs to be consistent with the SWSD Standards. The SWSD Policy calls for a consistent and integrated design approach, while allowing variability in the public art and sustainable landscaping elements. The SWSD Standards include a modular "kit of parts" that is streamlined and adaptable, allowing stations to be more cost-effective to design, construct, operate and maintain. The SWSD standardized materials and elements generally consist of high-performance architectural elements including stainless-steel finishes, low-iron fritted structural glass panels, architectural-grade concrete in three tones of gray, and a limited number of factory-finished painted surfaces. The result is a consistent architectural identity that is easy for transit riders to recognize and navigate, and more readily maintainable as part of a world-class transit system.

The SWSD Policy does contemplate that local jurisdictions and other third parties may request, subject to Board approval, design modifications or enhancements to Metro's station design standards for individual stations, contingent on the requestor providing full funding related to additional design and construction costs, as well as additional operation and maintenance costs resulting from accommodating the modifications or enhancements. Such design modifications and enhancements are also subject to the provisions of Metro's Supplemental Modifications to Transit Projects Policy

(Attachment B).

As part of Westside Purple Line Extension Section 3 Project ("Project"), Metro is currently in negotiations with UCLA to acquire real property interests to construct and operate the northwest entrance to the Westwood/UCLA Station ("Station Entrance") at the intersection of Wilshire Blvd and Gayley Ave. The property interests include a permanent easement for the station entrance and plaza and temporary construction easements on an adjacent university-owned parking lot. Following construction of the Project, UCLA intends to construct a development on the parking lot that may integrate with the Station Entrance. In the interim, UCLA has requested deviations from the SWSD Standards for above-ground structure materials and surface finishes at the Station Entrance in order to more closely match the common architectural palette found elsewhere on the UCLA campus and its future adjacent development.

DISCUSSION

Findings

The requested UCLA deviations include:

- Replacing the SWSD standard stainless steel finish on the station entrance portal canopy structure with a similar high performance metal cladding to match the UCLA standard beige concrete color;
- Replacing the SWSD standard three-toned gray concrete randomized rectangular patterned plaza finish with integral color concrete of beige and light red in a similar randomized rectangular pattern, but interspersed with bands of red brick pavers.

Considerations

In compliance with SWSD Standards Policy, UCLA has agreed to pay for these incremental costs to ensure there would be no financial impact to Metro or adverse impacts to the Project. Discussions over each party's maintenance responsibilities are still underway, however, consistent with the SWSD policy, Metro will not incur any additional cost as a result of the requested deviations. If the Board approves the deviation request, staff will memorialize design deviation-related terms and obligations-including full Metro-cost recovery-into the real estate acquisition agreements, and execute necessary contract changes orders to effectuate the work.

This deviation request, including UCLA's agreement to pay for the related costs, is also consistent with the provisions of the Board-adopted Supplemental Modifications to Transit Projects Policy, which is referenced in the SWSD Standards Policy.

Since incorporation of the SWSD into Metro architectural standards, Metro has consistently maintained the SWSD Standards in working with community stakeholders of all types. Staff took into consideration several factors in bringing this request for deviation from the SWSD Standards to the Board, including that UCLA is the fee property owner of the northwest station entrance, and that the proposed deviations are temporary in nature as the station entrance will ultimately be integrated into a future UCLA facility.

As with community stakeholders on all transit corridor projects, Metro is also working with UCLA on SWSD elements of variability, including selection of landscaping materials for the northwest entrance, and engaging UCLA and other community stakeholders in the artist selection process.

DETERMINATION OF SAFETY IMPACT

The deviation request would not present any major safety concerns, as the requested materials and finishes are found in older stations in the Metro system and generally do not present safety hazards to Metro riders or staff.

FINANCIAL IMPACT

There is no financial impact to Metro if the recommendation is approved.

Impact to Budget

There would be no impact to the budget if the recommendation is approved.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

This request is related to Goal #2: “Deliver outstanding trip experiences for all users of the transportation system.”

ALTERNATIVES CONSIDERED

The Board may choose not to approve the recommended deviation. UCLA has been advised that any decision to allow deviations from the SWSD Standards is a Board decision, which staff is obligated to enforce.

NEXT STEPS

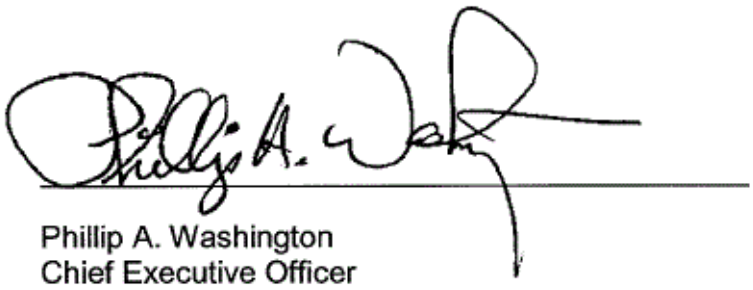
Should the Board approve the requested deviation, the Project team would negotiate final terms and enter into an agreement with UCLA to cover design and construction costs and determine maintenance obligations. The Project team would also work with the Project contractor to incorporate the related material and finish changes into the design drawings.

ATTACHMENTS

Attachment A - Systemwide Station Design Standards Policy
Attachment B - Supplemental Modifications to Transit Projects Policy

Prepared by: Adam Light, Senior Director, Countywide Planning & Development, (213) 922-6926
Nick Saponara, EO (interim), Countywide Planning & Development, (213) 922-4313
Kimberly Ong, EO, Projects Engineering, (213) 312-3143
Holly Rockwell, Sr. Exec. Officer - Real Estate, Transit Oriented Communities and Transportation

Reviewed by: James de la Loza, Chief Planning Officer, (213) 922-2920
Debra Avila, Chief Vendor/Contract Management Officer, (213) 418-3051



Phillip A. Washington
Chief Executive Officer

Los Angeles County
Metropolitan Transportation
Authority
One Gateway Plaza
3rd Floor Board Room
Los Angeles, CA

File #:2017-0605, **File Type:**Policy Agenda Number:20.

PLANNING AND PROGRAMMING COMMITTEE
JANUARY 17, 2018

SUBJECT: SYSTEMWIDE STATION DESIGN STANDARDS

ACTION: ADOPT SYSTEMWIDE STATION DESIGN STANDARDS POLICY

RECOMMENDATION

ADOPT the Metro Systemwide Station Design Standards Policy.

ISSUE

As Metro expands its transit system, a state-of-the-art systemwide design approach is needed to ensure that existing and future station facilities are safe, smart, clean and green. Adoption of the Systemwide Station Design Policy (Attachment A) will ensure all future Metro Rail and Bus Rapid Transit (BRT) stations follow a consistent, streamlined systemwide design, with integrated public art and sustainable landscaping as variable elements. This policy would take precedence over prior Metro policies regarding architectural design for Metro Rail and BRT station public areas.

DISCUSSION

Background

As the Metro system has expanded over the years, unique station architecture and design features have led to increased long term maintenance challenges with higher costs for the agency. As a result of these unique designs, ordering or stocking of special replacement materials or fabrication of custom features is costly and time intensive. This has also resulted in alterations that are not compatible with original design aesthetics of a particular station or line, and over time has led to the deterioration or loss of these unique designs and features, making some station public areas unsightly. In some cases, station public areas can become unsafe and universal access and efficient transit operations can be adversely affected.

In 2012, following a thorough review and evaluation of other leading state-of-the-art transit systems and international best practices for transit station design, and with an interdepartmental team, Metro developed the Systemwide Station Design using a modular system, or “kit-of-parts”. This kit-of-parts helps to ensure that stations are streamlined and adaptable for varying site conditions, allowing stations to be more cost-effective to design, construct, and maintain.

The Systemwide Station Design Kit-of-Parts

Consisting of high quality, high performance architectural materials and elements, the kit-of-parts can be configured to respond to varying station site conditions, as well as the functional and capacity needs of individual stations. These standardized materials and elements generally consist of low-iron fritted glass panels, stainless steel railings and cladding, architectural grade concrete, and a limited number of factory finished surfaces.

Importantly, while the Systemwide Station Design allows Metro to create a consistent, recognizable architecture, it also provides dedicated areas for elements of variability at each station. Metro's award winning station art program, as well as sustainable landscaping tailored to the county's various microclimates, are elements of variability developed in consultation with and responsive to the surrounding community.

Benefits of the Systemwide Station Design

Metro stations designed in compliance with the Systemwide Station Design Standards will be safer, smarter, cleaner and greener: safer for all riders and operators; intelligently laid out so that stations are easier to access and navigate; simpler and more cost-effective to clean and maintain; and more sustainable in terms of architectural materials, energy usage, and landscaping.

The benefits and advantages of the Systemwide Station Design include:

- Station entrances and public areas that are uncluttered, resulting in safer, more comfortable, and more open spaces;
- Station layouts coordinated with Metro Rail Operations and System Security to ensure visibility through and across stations for transit operators and security personnel;
- Intuitive station layouts to ensure station environments are easier for transit riders to recognize and navigate;
- Locations of station amenities and operational equipment that better accommodate the full range of passengers with various functional limitations as well as those who are highly functional;
- Streamlined integration of lighting, seating, operational equipment, wayfinding, customer information;
- Integration and prominent display of public art;
- A concise palette of durable, high quality materials integrated into station area designs that will be simpler to maintain and are more likely to remain attractive over time;
- Glass canopies and enclosures designed with green sustainable practices in mind to increase natural light access for station interiors and exterior station platforms;
- A modular "kit-of-parts", which will more easily adapt to various site constraints, facilitating the incorporation of new or changing elements and features required by federal, state or local statutes, transit design best practices, and Metro standards; and
- Improved maintainability

Consistency vs. Flexibility

Lessons learned over nearly 30 years of rail design and construction underscore the need for a more consistent and ultimately sustainable approach to station design, construction and maintenance.

That said, consistency does not translate into rigidity. The highly adaptable kit-of-parts, including station entrance plaza design, entrance structure orientation, as well as equipment and amenity configurations, allow for easier integration of adjacent development and first/last mile connections with the station site. As mentioned previously, the modules that make up the Systemwide Station Design kit-of-parts are flexible to accommodate visual connections to the identity and character of the surrounding communities, who are increasingly engaged in the design process. The kit-of-parts creates a framework with which Metro can engage stakeholders to ensure both the quality and safety of station design while being responsive to specific urban design goals and community character, in particular with the variable components of public art and landscaping.

Upon adoption of the policy, all future Metro station design contracts will require that station designs be consistent with the most current Systemwide Station Design Standards. Any accessory station building types not currently included in the Systemwide Station Design Standards are encouraged to use the Metro kit-of-parts materials wherever practicable, and follow similar architectural language as outlined in the current design standards. While not currently required, doing so will help ensure consistency in Metro station branding, improve durability of these facilities, and reduce design, construction and maintenance costs.

The policy also provides that local jurisdictions and other third parties may request, subject to Board approval, design modifications or enhancements to Metro's station design standards for individual stations, contingent on the requestor providing full funding. The policy stipulates that such design modifications and enhancements shall be subject to the provisions of Metro's Supplemental Modifications to Transit Projects Policy, and that third party funding shall cover all related additional design and construction costs, as well as additional operation and maintenance costs for these modifications or enhancements, as required by the Board.

Current Status of Implementation

The Systemwide Station Design Standards were vetted through internal coordination with Metro departments, and implementation of the Systemwide Station Design is well underway. Currently, Metro has 18 stations in either the design or construction phase that are largely compliant with the Systemwide Station Design Standards. The implementation process outlined in the Systemwide Station Design Policy will allow for continual improvement of these standards, through updates to the Metro Rail Design Criteria (MRDC), as appropriate.

Integration with Metro's Transit-Oriented Communities (TOC) Program

The adoption of the Systemwide Station Design Policy is part of a host of new and existing policies, programs and processes that together will make up Metro's TOC Program. Over the next six months, staff will work through the Measure M Policy Advisory Council (PAC) to develop a TOC Policy and more clearly define Metro's overall TOC Program. Among other objectives, the TOC Policy will provide direction on eligibility of Metro spending on both TOC activities as well as Local Return funds. The TOC Program will be part of the Long Range Transportation Plan (LRTP) process and will provide clarity on the policies, programs and processes that drive Metro's TOC work. Both of these documents will be brought to the Board for consideration and then adoption, in late winter 2017 and summer 2018. The Board can expect to see other portions of the TOC Program rollout prior to spring 2018, including actions to implement various components of the First/Last Mile Program. Going forward, all Board reports and recommendations that relate to the TOC Program will include

reference to such.

DETERMINATION OF SAFETY IMPACT

An adopted Systemwide Station Design Standards Policy will help ensure that future Metro stations are safer for transit riders and employees. Stations following these standards will have uncluttered public areas with clear site lines making them safer, more accessible, spacious, and comfortable.

FINANCIAL IMPACT

Adoption of the Systemwide Station Design Policy itself has no direct financial impact, as the Systemwide Station Design Standards are already part of the MRDC, Metro Bus Rapid Transit Design Criteria (MBRTDC) and related Architectural Standard/Directive Drawings, and new Metro stations under construction are already complying with most provisions of these standards.

Through implementation of this policy, Metro can expect economies of scale and reduced costs for station maintenance and replacement needs. Currently, unique architectural design and features in station public areas have led to ongoing maintenance challenges and costs. As a result, ordering or stocking of special replacement materials and fabrication of custom features is costly and time intensive. The Systemwide Station Design uses a modular kit-of-parts that is streamlined and adaptable, allowing stations to be more cost-effective to design, construct, and maintain.

ALTERNATIVES CONSIDERED

The Board could elect to not adopt the new policy, and rely on the current Metro design standards to guide station design. This is not recommended because although Metro design requirements already include the Systemwide Station Design Standards, Metro often receives requests for customized station architectural styles. Adoption of the policy reinforces Metro's commitment to a consistent, integrated systemwide design approach and the creation of a safer, smarter, cleaner and greener transit system.

NEXT STEPS

With Board approval, the policy will help ensure that all future Metro Rail and BRT stations, as well as renovations of existing stations where appropriate, are consistent with the Systemwide Station Design Standards as contained in the MRDC, MBRTDC and related Architectural Standard/Directive Drawings.

ATTACHMENTS

Attachment A - Metro Systemwide Station Design Standards Policy

Prepared by: Rachelle Andrews, Principal Transportation Planner, (213) 922-3896
Adam Light, Senior Director, (213) 922-6926
Nick Saponara, Deputy Executive Officer, (213) 922-4313
Jenna Hornstock, Executive Officer, (213) 922-7437

Reviewed by: Therese W. McMillian, Chief Planning Officer, (213) 922-7077

Phillip A. Washington
Chief Executive Officer

ATTACHMENT A

METRO SYSTEMWIDE STATION DESIGN STANDARDS POLICY

POLICY STATEMENT

In order to continue building and maintaining a state-of-the-art transit system, the Los Angeles County Metropolitan Transportation Authority (Metro) has determined that all future Metro Rail and Bus Rapid Transit (BRT) station designs shall follow a consistent, integrated systemwide design approach, with integrated public art and sustainable landscaping as variable elements. This policy takes precedence over prior Metro policies regarding architectural design for Metro Rail and BRT station public areas.

Station designs shall be in compliance with Metro's Systemwide Station Design Standards, as set forth in the Metro Rail Design Criteria (MRDC), Metro BRT Design Criteria (MBRTDC) and related Architectural Standard/Directive Drawings, which may be amended from time to time. Accordingly, Metro will no longer develop unique architectural styles for future stations, unless specifically directed otherwise by the Metro Board of Directors.

PURPOSE

Metro stations designed in substantial compliance with the Systemwide Station Design Standards will be safer, smarter, cleaner, and greener. The Systemwide Station design uses a modular "kit-of-parts" that is streamlined and adaptable, allowing stations to be more cost-effective to design, construct, operate, and maintain. Stations following these standards will have uncluttered public areas, making them safer, more accessible, spacious, and comfortable. Consistent architecture, signage, and intuitive wayfinding will make it easier for riders to recognize and navigate stations. The highly adaptable "kit-of-parts" allows for easier integration with adjacent development and first/last mile connections to the station site. Metro's award-winning public art program, as well as sustainable landscaping, will serve as elements of variability developed in consultation with, and responsive to the surrounding community.

APPLICATION

This policy applies to all BRT, Light Rail, and Heavy Rail stations, and shall be adhered to by all Metro employees, consultants, contractors and vendors.

1.0 BACKGROUND

Metro's objective is to provide for the continuous improvement of an efficient and effective transportation system for Los Angeles County. Achieving this mission requires designing, constructing and operating a dependable, safe, convenient, comfortable and state-of-the-art intermodal transportation system. Accordingly, station architecture and site design must be consistent with this mission.

As the Metro system has expanded over the years, unique architectural design and features in station public areas have led to a lack of visual unity and in many cases, have contributed to long term maintenance challenges with higher costs. As a result, ordering or stocking of special replacement materials, or fabrication of custom features is costly and time intensive, and can result in alterations that are not compatible with the original design aesthetic for a given transit line or individual station. Over time, the challenging maintenance issues lead to deterioration or loss of these unique designs and features. This can result in station conditions that are unsightly, and in some cases can become unsafe,

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making stations difficult to access and navigate and sometimes creating obstacles to safe and efficient transit operations.

Changing federal, state and local government requirements (such as the Americans with Disabilities Act (ADA), transportation funding rules, and building codes), as well as those of Metro, have resulted in many existing Metro stations that do not meet current standards. Alterations to conform these stations to current standards can result in significant impacts to station functionality, as well as adversely impacting unique architectural finishes and features in station public areas.

In 2012, following a thorough review and evaluation of other leading state-of-the-art transit systems and international best practices for transit station design, Metro developed the Systemwide Station Design using a modular system, or "kit-of-parts". This kit-of-parts consists of high quality, high performance architectural materials and elements that can be configured to respond to varying station site conditions, as well as the functional and capacity needs of individual stations. These standardized materials and elements generally consist of low-iron fritted glass panels, stainless steel railings and cladding, architectural grade concrete finishes, and a limited number of factory finished surfaces.

The Systemwide Station Design also provides for integrated public art and sustainable landscaping, as elements of variability developed in consultation with, and responsive to the surrounding community.

Metro's Systemwide Station Design layouts provide for open plaza, concourse and platform designs, with streamlined integration of lighting, operational equipment, wayfinding, and customer information, as well as prominent display of integrated public art. Benefits and advantages of the Systemwide Station Design include, but are not limited to the following:

- Station entrances and public areas that are safer, more comfortable, and will feel more open and spacious;
- Intuitive station layouts to ensure station environments are easier for transit riders to recognize and navigate;
- Location of station amenities and operational equipment that better accommodate the full range of passengers with various functional limitations as well as those who are highly functional;
- Station layouts coordinated with Metro Operations, Safety, and Security Departments to ensure visibility through and across stations;
- A concise palette of durable, high quality materials integrated into station area designs that will be simpler to maintain and are more likely to remain attractive over time;
- Glass canopies and enclosures designed with green sustainable practices in mind to increase natural light access for station interiors and exterior station platforms;
- A modular "kit-of-parts" which will more easily adapt to various site constraints facilitating the incorporation of new or changing elements and features required by federal, state or local statutes, transit design best practices and Metro standards;
- A highly adaptable "kit-of-parts" allows for easier integration with adjacent development and first/last mile connections to the station site; and
- Improved maintainability.

The Systemwide Station Design Standards were vetted through internal coordination with Metro departments and implementation of the Systemwide Station Design began with the Regional Connector,

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Crenshaw/LAX Line, and Purple Line Extension projects, which are largely compliant with the Systemwide Station Design Standards. The implementation process will allow for continual improvement of these standards, through updates to the MRDC and MBRTDC, as appropriate.

2.0 PROCEDURES

2.1. Contracts for New Metro Stations

Effective as of the date of this policy, all future Metro station design contracts shall require that station designs be consistent with the Systemwide Station Design Standards as contained in the most current MRDC, MBRTDC, and related Architectural Standard/Directive Drawings at the contract award date.

Deviations from certain provisions of this standard, such as station site layouts or equipment types, may be allowed to address unique site constraints, new technology, or specific station needs, but only after a thorough review process and with concurrence among affected Metro departments.

Station designs shall remain consistent with the most current Systemwide Station Design Standards throughout the preliminary design phases, including Preliminary Engineering, BAFO, and contract award. Any station vertical building types not covered specifically within the MRDC, MBRTDC and related Architectural Standard/Directive Drawings are encouraged to use the Metro Kit-of-Parts materials, and follow similar architectural language as outlined in the current design standards, however, these facilities are not required to follow the Systemwide Station Design.

Notwithstanding the preceding provisions of this section 2.1, the Board may at its discretion provide specific direction to Metro staff that certain new stations, such as major regional transfer hubs, have a unique architectural style or language, instead of strictly following the Systemwide Station Design Standards.

Local jurisdictions and other third parties may request, subject to Board approval, design modifications or enhancements to Metro's station design standards for individual stations, contingent on the requestor providing full funding. Such design modifications and enhancements shall be subject to the provisions of Metro's Supplemental Modifications to Transit Projects Policy. Third party funding shall cover all related additional design and construction costs, as well as additional operation and maintenance costs in perpetuity for these modifications or enhancements, as required by the Board.

2.2 Station Retrofit Contracts

Design contracts for retrofit projects that update, enhance or otherwise impact the public areas of existing stations shall require that designs comply wherever feasible with the MRDC, MBRTDC and related Architectural Standard/Directive Drawings. All attempts will be made to ensure that new materials incorporated into the design shall meet current standards, and be consistent with the Metro Kit-of-Parts family of standardized systemwide materials and finishes. As the public areas of existing stations within the Metro system vary greatly, a systematic design approach shall be taken during the design and construction process of each retrofit project. Strict application of the Systemwide Station Design Standards materials and/or layout may not be appropriate in all cases, as a number of existing stations and rail lines have a unique or specific architectural design language. When replacement of existing materials, finishes, or features, or introduction of new equipment is required, ad-hoc alterations in station public areas shall be avoided. Instead, through coordination with Capital Project Engineering,

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Countywide Planning and Development, and Operations, impacts of such alterations on station public areas shall be considered holistically, and integrated into the station environment in a streamlined and aesthetically appropriate manner. In particular, and wherever feasible, addition of equipment within or visible from station public areas shall be integrated into station walls or other enclosures that match the Metro Kit-of-Parts architectural finishes (or that are appropriate for the finishes and features of existing stations with unique architecture) to ensure that alterations are in keeping with the streamlined approach of the Systemwide Station Design Standards. Art & Design shall be included in the review process to ensure impacts to pre-existing artworks are avoided or minimized.

2.3. Updates to MRDC and Standard/Directive Drawings

The Systemwide Station Design Standards provide a consistent basis for Metro transit station architectural design, and shall be kept up to date with current building, accessibility, fire and life safety codes and other statutory requirements as they change. Additional updates may be appropriate as innovative new practices are developed and implemented at stations, to improve the usability and functionality of stations. Any revisions or amendments to the MRDC, MBRTDC and related Architectural Standard/Directive drawings as they relate to the Systemwide Station Design Standards or affect station public areas must go through the Systemwide Baseline Change Notice (SBCN) process. Once adopted, new or revised standards shall be circulated as appropriate to design and engineering teams for all ongoing new station and existing station retrofit projects.

3.0 DEFINITION OF TERMS[1]

Architectural Directive Drawings – Set of technical drawing sheets defining and illustrating the specific design details of Metro stations, including light and heavy rail stations. Standard technical detailed drawings must be followed. Actual station design elements contained in these drawings may vary depending on specific site requirements.

Architectural Standard Drawings – Set of technical drawing sheets defining Metro's standard design details of Metro stations, including light and heavy rail stations. Standard technical detailed drawings must be followed.

Contract Change Notice (CN) – Official document issued by Metro to a contractor that authorizes a change or addition to contract requirements, in regard to a specific design as outlined in the MRDC, and/or Architectural Standard/Directive Drawings. Changes are issued to ensure contracts meet up-to-date requirements.

Elements of Variability – Defined areas and features within Metro transit stations and station sites that provide unique designs within specified parameters. In the case of the Systemwide Station Design Standards, the elements of variability are primarily public art and landscaping.

Metro Kit-of-Parts – Collection of integrated modular elements, features, materials and finishes provided in the Systemwide Station Design Standards, which can be configured in a variety of ways to respond to station type, unique site conditions, expected customer volumes, and other variables.

[1] Definitions in this section are for the purpose of providing clarity for this policy document, do not supersede definitions in the Metro Rail Design Criteria and Metro Bus Rapid Transit Design Criteria, and do not set new requirements as part of this policy.

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Metro Bus Rapid Transit Design Criteria (MBRTDC) – Metro's formal written design standards for bus rapid transit (BRT) stations, which provide a consistent basis for the design of Metro BRT projects.

Metro Rail Design Criteria (MRDC) – Metro's formal written design standards for transit stations, which provide a consistent basis for the design of Metro Rail Transit Projects, including both Heavy Rail Transit (HRT) and Light Rail Transit (LRT).

Systemwide Station Design – Metro's established architectural design concept and material palette for rail and BRT transit stations.

Systemwide Station Design Standards – Metro's established criteria, layouts, materials, features and details contained in the MRDC and Architectural Standard/Directive Drawings that specify how Metro stations are to be designed or retrofitted in keeping with the Systemwide Station Design. These standards must also be refined from time to time to respond to statutory requirements, industry best practices, and the needs of the Metro system.

Systemwide Baseline Change Notice (SBCN) – Revisions made to the MRDC and/or Architectural Standard/Directive Drawings to ensure Metro's design requirements meet current state and federal requirements, and integrate innovative technology. SBCNs require justification and approval signatures from necessary Metro departments before adoption.

4.0 RESPONSIBILITIES RELATED TO IMPLEMENTATION OF SYSTEMWIDE STATION DESIGN STANDARDS

Systemwide Design, Countywide Planning and Development reviews station design submittals to ensure compliance where applicable with Systemwide Station Design Standards as contained in the most up-to-date versions of the MRDC, MBRTDC and related Architectural Standard/Directive Drawings, and assists in coordinating design comments from other Countywide Planning and Development departments. Initiates and coordinates updates and revisions to the Systemwide Station Design Standards with Engineering, Operations, Safety, and Security.

Engineering coordinates regularly with internal Metro staff to make updates as required to the Systemwide Station Design Standards as contained in the MRDC, MBRTDC and related Architectural Standard/Directive Drawings. Circulates draft revisions to ensure updates are approved by all required Metro departments, and adopted by project contract teams.

Transit Project Delivery ensures station construction projects are designed and constructed in conformance with the Systemwide Station Design Standards as contained in the MRDC, MBRTDC and related Architectural Standard/Directive Drawings, while maintaining cost effectiveness and an on-time delivery. Coordinates with internal Metro departments to circulate station design submittals for review and comment, to ensure projects meet Metro's requirements.

Operations ensures new station designs and modifications to existing stations meet operational and maintenance requirements. With respect to this role, Operations reviews and provides input on proposed updates to the Systemwide Station Design Standards.

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Art & Design manages integration of site specific station artworks, and rotating exhibitions that engage communities, create a sense of place, and improve the transit customer experience. The department also advises on a range of design elements and establishes integrated environmental graphic design standards to assist customer navigation and wayfinding. Art & Design reviews and provides input on proposed updates to the Systemwide Station Design Standards and to proposed retrofits to the system.

Safety & Security provides station design teams with critical safety requirements, security information, best practices, and regulatory guidance information to maintain a safe environment within station public areas. Reviews and provides input on proposed updates to the Systemwide Station Design Standards, and coordinates any issues with the Systemwide Design team, Engineering, and Operations.

Office of Civil Rights ensures federal, state and local accessibility requirements for station public areas are being met, and additional accommodations are established within the Metro system to accommodate the full spectrum of passengers with various functional limitations, including mobility, visual, cognitive or similar impairments and limited language proficiency. Reviews and provides input on proposed updates to the Systemwide Station Design Standards, and coordinates any issues with the Systemwide Design team, Engineering, and Operations.

Office of Extraordinary Innovation coordinates with Metro departments to develop innovative methods, and new technology to increase the usability and maintainability of stations, including the implementation and updating of the Systemwide Station Design Standards.

5.0 PROCEDURE HISTORY

1992 Board adopts Rail Station Design Policies

2001 Board adopts Bus Rapid Transit Design Standards

2005 Baseline Metro Rail Design Criteria (MRDC) updated for light rail implementation, further refining design standards to incorporate maintenance, operations and regulatory requirements

2010 Baseline MRDC updated for systemwide implementation, further refining design standards to incorporate maintenance, operations and regulatory requirements

2012 Systemwide Station Design Standards are developed and incorporated into updated MRDC and Architectural Standard/Directive Drawings to unify systemwide identity, integrate new fare equipment, regulatory requirements and updated systemwide signage standards, and to improve maintainability.

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Metro Systemwide Station Design Standards Policy

Planning and Programming Committee

January 17, 2018

Metro

Design Standards Development

- Systemwide Station Design “kit-of-parts” developed in 2012
- Project goals:
  - improve legibility and maintainability
  - raise the bar on station design
- Design Standards developed with Metro inter-departmental coordination
- 18 new stations under construction or design apply kit-of-parts design elements and materials

Design Principles for New Stations

Safe

Open lines of sight for passengers and customers

Smart

Contemporary design that is easy to identify, access and navigate

Clean

High Performance Materials

Green

Sustainable building materials and landscaping

Materials

CONCRETE *STAINLESS STEEL* *GLASS*

Portal Entrance - Systemwide Station Design

Wilshire/Western Prototype Canopy

Crenshaw/LAX

Downtown Inglewood Station

Purple Line Extension

Regional Connector

1st/Central Station

Design Variances from Kit-of-Parts

- Local jurisdictions and other third parties may request design modifications or enhancements for individual stations.

- Requests for design modifications and enhancements are subject to Board Approval and Metro's Supplemental Modifications and Betterments Policy.

- Requestors shall cover related additional design, construction, operation and maintenance costs, as required by Board.

Thank you.
Metro

Los Angeles County
Metropolitan Transportation Authority

One Gateway Plaza
Los Angeles, CA 90012-2952

213.922.2000 Tel
metro.net

Metro

PLANNING AND PROGRAMMING COMMITTEE
NOVEMBER 20, 2013

SUBJECT: SUPPLEMENTAL MODIFICATIONS TO TRANSIT PROJECTS POLICY

ACTION: ADOPT POLICY

RECOMMENDATION

Adopt the policy contained in Attachment A which provides direction for considering requests from local jurisdictions, third parties, and other stakeholders for supplemental modifications to transit corridor projects at various stages in the project development process.

ISSUE

Supplemental Modifications to transit corridor projects such as betterments or enhancements to the project scope are often requested by cities, other agencies, and outside parties – sometimes after the project definition is approved and the environmental review is certified by the Board, after the project has received a Record of Decision (ROD) from the Federal Transit Administration (FTA), or after the design is frozen at the release of advanced design and construction procurement documents.

For our two most recent projects, the Crenshaw/LAX and Regional Connector, we have received such requests. This will become more prevalent as we continue to deliver the Measure R Transit projects.

A policy is needed to clearly outline the formal process Metro will follow upon receipt of any request, including the process for evaluating the Supplemental Modification, agreement on the scope, cost allocation and Board approval. This will ensure that all parties receive the same consideration. The Policy is designed to be consistent with all existing processes (such as environmental review), policies (such as the Grade Crossing Safety Policy and Uniform Cost Management Process and Policy), and agreements (such as Master Cooperative Agreements with local cities and utilities), which contain requirements related to Betterments. This Policy codifies existing practices and processes associated with Master Cooperative Agreements (MCAs) with cities. It does not override the MCAs. It is intended to clarify existing practice and to highlight a consistent approach. Further, it is consistent with the Uniform Cost

Management Process and Policy with regard to how scope reductions are addressed. Board approval of the Policy is being requested.

DISCUSSION

Metro currently addresses "Betterments" in its Master Cooperative Agreements. As we move through the delivery of the Measure R Transit Corridors, we are receiving requests to make design modifications or enhancements to the approved project definition. These requests which may be much larger in scope than utility infrastructure are being made after the design has been frozen and procurements released and/or awarded to contractors. They could result in contract modifications which may require Board approval and increased cost and risk to project delivery and potentially to federal funding and loans. This policy is intended to encourage early stakeholder participation so that the appropriate analysis can be performed earlier, minimizing the need to request Supplemental Modifications late in the project development process.

DETERMINATION OF SAFETY IMPACT

The adoption of this policy will have no impact on the safety of our customers and employees.

FINANCIAL IMPACT

There is no impact to the FY14 budget. This policy captures and clarifies past Board policy, practices, and agreements. It clarifies roles and responsibilities as well financial responsibility for supplemental modifications to the scope of a project requested by other entities.

Impact to Bus and Rail Operating and Capital Budget

There is no impact to the bus and rail operating and capital budget.

ALTERNATIVES CONSIDERED

The Board could choose not to adopt the Policy. This is not recommended. As we develop and implement the Measure R Transit Corridor projects, requests for changes to the approved Project Definition will continue to be received. A consistent framework for addressing these requests is needed for uniformity and to avoid last-minute requests that cannot be considered. Further, a policy as to who is financially responsible for the changes also needs to be adopted to ensure clarity.

NEXT STEPS

Upon Board approval, we will continue applying all existing policies, processes, and procedures within this adopted framework. We will also share this policy with cities, entities, and stakeholders affected by all Measure R Transit Corridor projects in the

planning and design phase to provide clarity as to how supplemental modifications are to be considered.

ATTACHMENT

A. Supplemental Modifications to Transit Projects Policy

Prepared by: Roderick Diaz, Director, Systemwide Planning (213) 922-3018
Renee Berlin, Executive Officer, Transit Corridors/Systemwide Planning (213) 922-3035

K.N. Murthy
Executive Director, Transit Project Delivery

Martha Welborne, FAIA
Chief Planning Officer

Arthur T. Leahy
Chief Executive Officer

ATTACHMENT A

Supplemental Modifications to Transit Projects Policy

Introduction

The Los Angeles County Metropolitan Transportation Authority (LACMTA) will follow a uniform process and policy for defining and evaluating whether requests by outside entities for Supplemental Modifications to a Transit Project (Project) may be incorporated into the Project's scope of work either as part of the Project itself or as a separate activity that might be implemented concurrently with the Project.

Definition of Supplemental Modifications

For the purpose of this Policy, Supplemental Modifications are defined as physical elements or features that are being requested to be added to the Project Scope of Work and which are outside of the approved scope (definition) of a transit project, as they were not included in the most recent project description or requirements approved under the Project's most recent environmental review documents and under the Project's Record of Decision (for projects completing federal [National Environmental Policy Act – NEPA] review), but are being requested to be implemented with the Project by a local jurisdiction, agency, or a third party.

Supplemental Modifications typically fall under two general categories – Betterments and project revisions:

- A Betterment is specifically defined in the LACMTA's Master Cooperative or Utility Agreements as an upgrade of an existing city or utility's facility or the property of a Third Party, be it a public or private entity, that will increase or upgrade the service capacity, capability, appearance, efficiency or function of such a facility or property of a third party. Examples of facilities that can be classified as betterments would include such items as utilities, street infrastructure, development sites, and other types of infrastructure elements within a community.
- Project Revisions are defined as potential revisions to a Project's Scope of Work that may or may not have been originally considered during the environmental review process, but were either rejected or were raised after the Project's Notice of Determination or after the issuance of a Project's Record of Decision. Project Revisions may or may not ultimately be classified as Betterments depending upon what kind of infrastructure is identified in the request for inclusion. Project Revisions may also include requests for improvements where the primary feature is something other than another element of infrastructure. Project Revisions might include features which benefit the Transit Project, but are not necessary for its implementation, purpose or usefulness and were not included in the LACMTA Board approved Project Definition or Life-of-Project budget.

LACMTA defines Betterments in Master Cooperative Agreements (MCAs) established with local, regional and state related jurisdictions or third parties wherein the Project will be constructed. This policy is not intended to override or supersede MCAs with partner entities. For ease of use, many of the principles, processes, and terms that define how Betterments are addressed may be applied to Project Enhancements as well.

Entities Requesting Supplemental Modifications

Requests for Supplemental Modifications may come from a single source or a combination of sources. Examples of groups that have requested Supplemental Modifications include, but are not limited to:

- Private individuals
- Private entities (e.g., developers, businesses, etc.)
- Utilities
- Other Governmental entities
- Elected Officials
- Community Groups
- Other Third Parties

When considering a request for a Supplemental Modification, it is important to note whether or not the Supplemental Modification should be considered as an element of another entity's own work program or could be classified as an additional requirement for mitigation of another entity's work program. In these cases, whether or not implementation has already been approved, such a requested Supplemental Modification should be referred to the other entity.

Stages of Project Definition and Supplemental Modification Consideration

Projects are defined with an increasing level of detail through several stages. While coordination with stakeholders, third parties and other entities is ongoing, specific milestones define discrete points at which the scope of a Project is defined or refined.

Milestone	**Level of Scope Definition**
At the end of Alternatives Analysis	Definition of Alternatives for Environmental Review (Received by Board)
At the end of Draft Environmental Review	Adopted Locally Preferred Alternative (LPA) and preliminary mitigations
At the end of Final Environmental Review (Environmental Impact Statement/Environmental Impact Report [EIS/EIR])	Adopted Project Definition and Mitigation Monitoring Plan, Notice of Determination (per CEQA), and Record of Decision (for federally cleared projects)

Milestone	Level of Scope Definition
DESIGN FREEZE – At the end of Preliminary Engineering/issuance of Procurement Documents	Preliminary Engineering Design (incorporating design refinements and value engineering) and additional detail on Project Mitigations are finalized for contract purposes. (Preliminary Engineering is defined in Master Cooperative Agreements, Exhibit C.)
Award of Construction Contracts	Detailed Design of the Project and Project mitigations. For Design/Build Contractors, the Contractor will complete the design and construction begins.

Requests for a Supplemental Modification

Any entity which desires to request a Supplemental Modification to a Project Scope of Work shall do so at the earliest possible point in the project development process. However, LACMTA is not obligated, nor does this Policy require it to accept or implement the requested Supplemental Modification. The timing of the request for a Supplemental Modification, with respect to certain Project Milestones, will affect how it may be evaluated:

- Supplemental Modifications that are requested after the adoption of the Project Definition, relevant mitigation measures and certification of the EIR and Record of Decision, are more likely to require additional environmental review and have the potential for significant Project construction delays associated with them than if they were offered up prior to these final project milestones.
- Supplemental Modifications which are not incorporated into a Project prior to implementation of the Design Freeze milestone, and especially after the award of a contract, are expected to have significantly higher costs due to greater schedule impacts, and could ultimately jeopardize funding or loan agreements, and therefore introduce significant financial risk.
- Supplemental Modifications that are not included and incorporated into the Project's construction contract for implementation by the award of the construction contract (including design/build contracts) can only be added by way of a contract change, which will likely result in higher Project costs, require additional funding source(s) beyond the Board approved project budget, and may require further consideration and approval by the LACMTA Board of Directors. Requests for changes to a Project which rise to the level of a Supplemental Modification and are proposed toward the end of the procurement process may

also contain the potential for reopening the procurement process, or at least may necessitate a contract change.

LACMTA is under no obligation to accept or implement any Supplemental Modifications. Such modifications may:

- Create a delay in obtaining Project approval by the LACMTA Board of Directors, or any state and/or federal agency responsible for approving and funding the Project;
- Require deferring or delaying approval of a Project's Notice of Determination and/or Record of Decision;
- Require additional environmental review, resulting in cost and schedule impacts;
- Require use of a Project's unallocated contingency and/or changes to the approved Project's Life-of-Project Budget;
- Conflict with the requirements of any grant or loan obtained in support of the Project;
- Require a material redesign of the Project, which would necessarily involve a significant delay in implementation of the Project Contract or the need to initiate an entirely separate solicitation and contract.

Evaluation Process

The proposed process for evaluating the viability of a Supplemental Modification will consist of a methodical review that will be undertaken in accordance with the particular point in the process described in the previous chart and will not require an additional set of rules or criteria. The final determination will be made after assessing whether a requested Supplemental Modification should be included as part of the Project Work Scope, treated as an element to be handled and addressed separate from the Project, or dropped from further consideration.

Should a Supplemental Modification be recommended prior to reaching a Project milestone, LACMTA will consider each requested Supplemental Modification subject to a three-part evaluation. The three parts of the evaluation process are intended to ensure that:

(1) Requests for Supplemental Modifications are evaluated according to a consistent and rigorous analysis to determine a) whether they are necessary, b) whether they will have an impact on the provision of the particular service provided by the Project or c) whether the added work can be incorporated without significantly delaying or altering the nature of the Project;

(2) Elements that are determined not to be necessary to accomplish the Project will only be included in the work scope if LACMTA receives written commitments (including any associated and necessary funding) by the requesting entity that are sufficient to ensure there is no risk to the Project's schedule and budget; and

(3) Board direction is required to authorize any Supplemental Modification in all other circumstances.

The three parts of the evaluation are described below:

PART 1 – Evaluation of Necessity of Supplemental Modifications

The first step in the evaluation of a Supplemental Modification is a determination of whether a requested modification should be added to the Project Definition. A modification to the Project Definition may occur if it is required by ANY of the criteria described below:

- **Physical Necessity**: Essential for the basic function or operation of the project;
- **Capacity:** Required to provide the level of capacity (throughput) required for projected demand or projected operation of the system for the horizon year of analysis;
- **Policy:** Required to satisfy LACMTA's existing Policies related to planning and design of transit facilities (e.g., the Grade Crossing Safety Policy) and the operation of service on those facilities;
- **Environmental Mitigation:** Required as a result of analysis of the environmental impacts which will only be resolved through the approval of the modification
- **Standards:** Required by existing adopted and published standards which are identified and incorporated into the contractually established Design Freeze. Such standards must be adopted and published prior to or by the Design Freeze date and must also be determined to apply to LACMTA.

If a requested Supplemental Modification meets any of these requirements and fits within the project budget and is not part of another entity's required work program or mitigation requirements, it shall be considered necessary in the case that the full Project is implemented as proposed.

The inclusion of the Supplemental Modification depends upon LACMTA's ability to accommodate the cost of the modification within the Project Budget. Should the Project Budget be insufficient to cover the cost of the inclusion of the entire scope of the

Project plus the requested modification, then the entire Project (if a Measure R project) shall be analyzed in accordance with the Unified Cost Management Process and Policy for Measure R Transit Projects.

In following the Unified Cost Management Process and Policy, it is important to note that should existing project features be removed from the Project Definition in order to accommodate a requested Supplemental Modification, such a decision must also be analyzed using the criteria outlined in Part I. Elements that are determined not to be "necessary" per these criteria may be eligible to be removed from the Project scope. Depending on the size of the requested Supplemental Modification or the significance of the impacts arising from its incorporation into the Project, findings shall be reported to the Board.

In the case that the analysis according to the Unified Cost Management Process and Policy finds that additional funding is still required to implement the Project with the Supplemental Modification, staff shall analyze whether funding for the inclusion of the modification would require :

a. Cost reductions within the same transit corridor; and/or
b. Cost reductions within the same sub-region;

In either of these two cases, prior to the submission of a staff recommendation regarding funding for the proposed Supplemental Modification for a final decision by the LACMTA's Board, the Board shall seek the concurrence from the sub-region either through the sub-regional Council of Governments (COG) or the established entity representing the subregion.

PART 2 – Consideration of Non-Required Supplemental Modifications

For Supplemental Modifications which, upon initial review, are determined not to be included as part of the Project per the Part 1 analysis, then the requested modification will be analyzed in accordance with all of the conditions below, prior to incorporation of into the Project Work Scope:

- Funding – The Modification is (1) cost neutral, (2) results in a reduction in the Project cost, or (3) committed funding is identified from sources outside the Project Budget to cover the cost of the full Supplemental Modification and all related Project cost impacts;
- Lack of Need for Additional Environmental Review – Upon review of the modification request, it is determined that there is no basis for additional changes or supplements to the environmental review that could jeopardize the

implementation of the Project. (Supplemental Modifications that do require additional public disclosure and environmental analysis may create additional schedule risk and may increase the scope of the project and thus the cost and therefore may be found unacceptable);

- Lack of Impact to Contract Procurement – Analysis indicates that implementation of the modification will cause no delays or negative impacts on the procurement process for final design and construction of the project;
- Lack of Schedule Impact –The analysis indicates that implementation of the modification will cause no delays, have no negative impacts on the Contractor's approved schedule and will not extend the Project beyond the projected Revenue Service Date;
- Adopted Agreement – An agreement is adopted between Metro and the requesting entity that defines roles, responsibilities and funding contributions for the Supplemental Modification. In the case of Betterments, Master Cooperative Agreements define how Betterments are negotiated and incorporated; and
- Funding and Program Requirements – That the cost and associated schedule issues required by inclusion of the Supplemental Modification will not jeopardize the ability of LACMTA to meet any project requirements for any funding, grant programs (e.g., New Starts), or loan programs (e.g., TIFIA [Transportation Infrastructure Finance and Innovation Act loans] that apply to the Project.

If a Supplemental Modification meets ALL of these requirements, it may be recommended for inclusion into the Project Work Scope (either as a modification to the Project Definition or as a parallel work effort to the defined Project.) This would need LACMTA Board approval and the approval of any project implementation and funding partners (e.g., appropriate state and federal agencies involved with environmental review and grant and loan programs).

PART 3 – Supplementary Board Direction

The LACMTA Board may consider the inclusion of additional work scope at any publicly-noticed meeting and as such, may provide additional direction to the Project staff that either supplements, rejects or overrides the analytical criteria described in Parts 1 and 2 above. LACMTA Board direction to pursue any specific Supplemental Modification shall include and identify all relevant funding to cover the cost of inclusion of the Supplemental Modification in the same action. It is important to note that LACMTA Board direction is required for any Supplemental Modification that exceeds the contractually-specified dollar value limit after the award of Project Construction Contracts (including Design/Build Contracts) because such a modification would necessarily result in contract change orders.

Funding Supplemental Modifications

As indicated by the evaluation process described above, LACMTA will not pay for or bear the Cost of any Supplemental Modification that is not explicitly required by any policy, standard, regulation, or law in operation relied upon to define any element of the approved Project. Funding shall be committed by requestors of Betterments or Supplemental Modifications in those cases where the request results in an increase in cost, except as otherwise directed by the Board.

Third Party Request for Deviations from Systemwide Station Design Standards Policy

Purple Line Extension
Westwood/UCLA Station

Planning & Programming Committee

Agenda Item #: XXX

Metro

Recommendation

APPROVE UCLA third-party request for design deviations from Systemwide Station Design (SWSD) Standards at Purple Line UCLA/Westwood Station northwest entrance plaza.

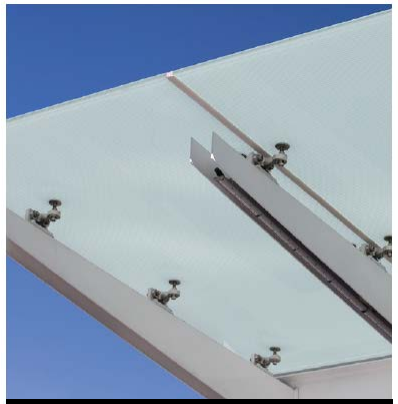
Per Board Policy, all new Metro rail and BRT stations shall be in compliance with Metro's SWSD standards, unless otherwise approved by the Board.

Systemwide Station Design Standard Subway Station Entrance Plaza

Metro

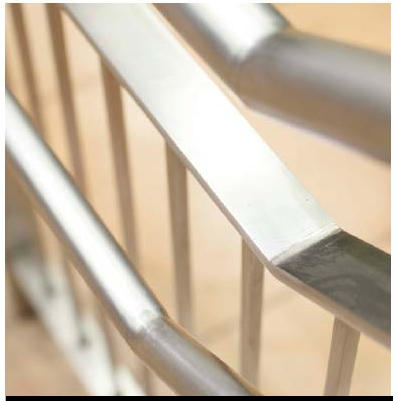
Systemwide Station Design Standards Policy

- Board Adopted – January 2018
- Consistent streamlined “kit-of-parts” architecture that is safe, smart, clean, and green
- High performance materials
- Accommodates varying site conditions
- Allows stations to be more cost-effective to design, construct and maintain
- Variable Elements:
  - Landscaping
  - Artwork



Glass Canopy

3-Toned Concrete



Stainless Steel

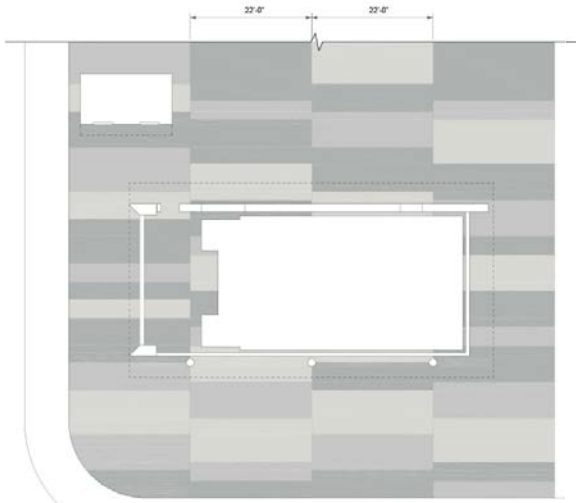
LED Lighting

Metro

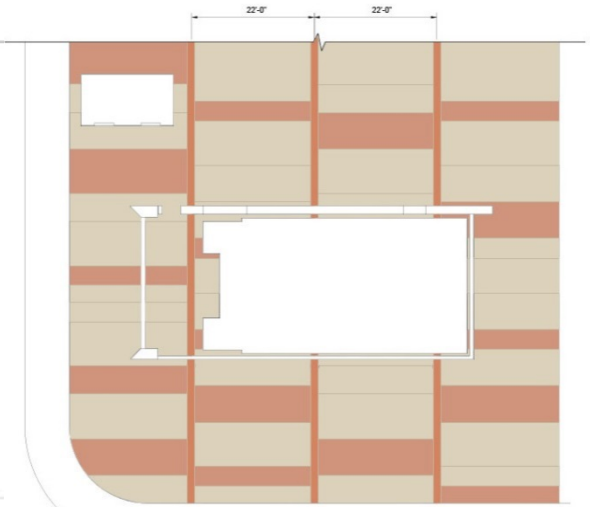
Design Deviations Requested by UCLA

Station entrance with Metro standard finishes

Station entrance with UCLA requested finishes



Metro standard plaza paving



UCLA requested plaza paving

Deviations include:

- Change Metro standard three-toned gray concrete plaza finish to beige and light red concrete.
- Change Metro station entrance portal canopy finish from standard silver-colored stainless steel to beige tinted stainless steel.

Metro

Considerations

- UCLA is the fee owner of the northwest station entrance plaza property.
- Requested deviations are temporary. Station plaza proposed to be integrated into a future UCLA facility.
- UCLA has agreed to pay for additional costs resulting from deviations.
- Metro is working with UCLA on SWSD elements of variability—landscaping and artwork.